

ELECTRONIC PUBLIC IMPROVEMENT PLAN REVIEW
APPLICANT'S GUIDE

APPENDIX A
PROJECTDOX INSTRUCTIONS

HOW TO FIND TASKS AND PROJECTS

<https://planreview.cityofmedford.org/ProjectDox/>

THE PROJECTDOX FORMAT IS BASED ON "TASKS" – For each project, there are many tasks that need to be completed before the project is approved. Some of these tasks must be completed by the Applicant, and other tasks must be completed by city staff.

Once the Applicant completes a task, the ProjectDox program creates tasks for city staff to complete, and then once city staff complete their tasks, the Applicant receives a new task - back and forth until the project is approved.

HOME SCREEN TASKS TAB – On the "Home" screen, either the "Tasks" or "Projects" tab will be displayed. The "Tasks" tab will list all open tasks to be completed by the Applicant, such as "Applicant Upload" or "Applicant Corrections". When the project is in review by the City, then it will not be listed on the "Tasks" tab because the Applicant doesn't have an available task at that time.

Electronic Plan Review

Home Q All Tasks Profile

Tasks (PF) Projects

Refresh Save Settings

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS	PRIORITY	DUE DATE	CREATED	DESCRIPTION
Applicant Resubmit Task	P20-00321	P20-00321 - Medford Engineering Template - 10/26/2020 11:22:03 AM	Applicant	FirstInGroup	Accepted	Medium	11/9/2020 5:01:31 PM	10/26/2020 5:01:31 PM	Test Project 1

1 - 1 of 1 records

HOME SCREEN PROJECTS TAB – On the “Home” screen, the “Projects” tab will list all projects that the applicant has been associated with. Projects can be found here even when the Applicant doesn’t have a task. The default view is recent projects only. To see more, click the “All Projects” button at the top right of the screen.

The screenshot displays the 'Electronic Plan Review' interface. At the top right, there are navigation buttons for 'Home', 'All Tasks', and 'Profile'. Below this, a tabbed interface shows 'Tasks (PF)' and 'Projects'. The 'Projects' tab is active. Below the tabs, there are buttons for 'All Projects', 'Refresh', and 'Save Settings'. On the right side, there are buttons for 'Recent Projects' and 'All Projects'. A dropdown menu shows 'Show 10 records'. The main content is a table with the following columns: PROJECT, OPTIONS, DESCRIPTION, OWNER, STATUS, and CREATE DATE. The table contains one record with the following data:

PROJECT	OPTIONS	DESCRIPTION	OWNER	STATUS	CREATE DATE
P20-00321		Test Project 1	PDox Admin	Applicant Corrections	10/26/2020 11:22:03 AM

At the bottom left, it says '1 - 1 of 1 records'. At the bottom right, there are navigation buttons: '+', '- prev', '1', 'next', '-', '-'.